Estate Tax - Claims For Refund

How does an estate make a claim for refund with the Department of Revenue?

The state of Colorado requires that an estate file a DR 1210 "Estate Tax Return," with the necessary attachments to claim a refund of tax overpayment made via extension. If the refund claim is a result of an amended return or federal audit, a DR 1210 must be filed with the word "AMENDED" written across the top. A refund claim or an amended return must be accompanied by proof that the IRS accepted the adjustments. This may include a federal Revenue Agent Report (RAR), federal closing letter or copy of the federal refund statement. The refund will include the amount of overpayment of tax and possibly interest from the date of overpayment or nine months after the date of the decedents death or generation-skipping transfer. See C.R.S. 39-23.5-112.

To inquire about the status of an estate tax refund contact the Department's Customer Service Center at (303) 238-SERV(7378).